Webinar How Many Now What-20261106_170002UTC-Meeting Recording

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Julie Rieken 0:19

Hello, all. I'm just making sure we've got audio and video. If somebody might go into the chat and let me know, are you able to see the screen that says how many, now what? That would be great.

And if audio is okay as well. Yes, yes. Thank you. Thanks for responding. Okay, good. And you're only seeing my PowerPoint screen, right?

Perfect.

Okay.

Well, here we are. It is noon. I'm ready to get started. And we've got, I think, a great session for us today called How Many Now What? And this is part three in our series of our Atlas webinars. And

The reason I'm so excited about this is because these are real live things that we're hearing from customers. And I think that's fantastic. So I love being able to share real live examples and this is one of them. So let's go ahead and get started. And I think we'll go maybe 25 minutes and then just leave time for questions. So I hope that's helpful for everyone.

I'll start by introducing myself. I'm Julie and I lead here at A2 Association Analytics. And we have, we've been, I think, pushing forward with some pretty interesting stuff. And out of that, we've had questions that I think are universal, whether or not you are an Association Analytics customer or not.

which is why we're doing today, actually. This question comes up no matter who you are and what you're using as your technology in your organization. So I think this will be really helpful. So, but if you've joined us before, welcome back. And if this is your first day with us today, then thank you. So today is not going to be about

data or plumbing. I mean, there's a little bit of data, of course, but it's about people. And it's specifically about what happens when the hardest part of what we often do all day long becomes easier. And I would like to hear from you at the end. So let's go ahead and

kick in. Today's called How Many Now What? So this is...

Here's what happened. We're on a call with a customer, and this customer was

counting how many members are in each chapter and who's where. And I'm watching this customer, and I was showing them an example from a different customer about how the questions over time at this other customer had changed. And we were just talking about
Why did that happen? Why did their questions change about their data? Meaning that this customer, this other customer, was seeing their data and started to ask different questions over time. And the customer we were on the phone with, she started to furrow her brow. And I said, oh my goodness, something's going on. You're looking concerned. Tell me what's up. And she says, well...
The issue with our data is that my people really spent most of their day just counting how many. And that's such a big deal that they almost don't know what to do when they get that answer. What do they do once they've found that answer? Because that's where all of the energy had been spent, was just getting straight up to that answer.
I thought, my goodness, that is real. We do spend a lot of time doing that. And why do we spend it? Because answering how many members an organization has can be really complicated. I'll show you why. And you live this daily, so you already know why it's hard, but I'll show you 2 graphics that maybe explain why even just getting to that is a complicated thing.
So we started hearing 2 questions. Number one, the leader's question, which was this woman's question. She says, well, how am I going to lead if they're once they know how many? What happens then? Since most of our time is spent in that arena, what happens once we have the answer of how many? What should we do?
And many people did not know how to ask the next question. So the team was so busy asking how many, they didn't even natively know like, well, once I get that answer, what should I do with it? And that's a really real situation too. So
People have a new set of issues and we're all in it together, which is we have these new tools that can give us these answers much more quickly than they ever could before. And what do we do once we can go beyond them? So let's go take a look. I've got some ideas on how to go. And I don't necessarily have, we don't necessarily have
all of the answers, but we do have some excellent customer patterns on how they have managed going forward with this. So here's the question I just want us to sit with to set the table here. What happens to people and to an organization when the hard part stops

being about getting the number.
Whether that is how many members do we have? How many people registered for the event? How many people registered, you know, before the event within the last 10 days?
And how do you get from, how do you get people to start asking that next question? And that is the complicated and the courageous part. Okay, I've got the answer. Now what actions should I take? So what changes for your organization and how do you lead from that? And where would you start if I was in your seat? And
Again, it's a hard seat to be in, but let's just talk about it. Okay. Well,
For anybody that's new, and I doubt that any of you are, but let's just say that for association teams, this could be a common pattern. And having sat on the board of an association for 10 years, this is something I can deeply connect with. Well, I want to get to some number.
Again, maybe it's one of those examples I gave you earlier. Well, you have to find the export. Do you have access to that system? Maybe, maybe not. Do you even know what system would have it? What fields would you export? Maybe I need access to that system.
And you have to wait a little bit, or you have to go ask the colleague who has access to the system, who maybe knows it really well, and they've been there maybe for 15 years, but they're in meetings until 3, and then they've got, you know, something else going on on Friday. And you need to build a spreadsheet. And then when you get that spreadsheet, finally, it's not matching up with what finance said.
So look at how much of that day goes to just getting a number and how little time is left for thinking about once I get that number, what does it mean? And that's a part of the problem. What happens when that time balance switches? I got my number. Now I have time to think about it instead of all of my time is spent getting the number and there's very little time left to think about it.
That small sliver at the end, that's the part that leadership is challenged with today. So what happens when that answer collapses into minutes instead of a week or more and we've lost context? And it isn't what do we do with all the extra time?
It's what do we do with all the thinking that we've never had time for? So that's our new challenge. And that's a big one in terms of thinking about how to deal with people and forward motion.
So the reason this is real is because we had a customer that started asking questions about their data, and the answer is because the world has shifted in the last couple

of years. Nobody likes a big, intricate spreadsheet better than the machine today. So I want to give you this example and share this story with you. This is where we We have been pushed by our customers into something where that time swap is now what they're facing. So I'll tell you the story of what they did. So this is, I've anonymized it. This is a large professional association. I won't name them, but these are true numbers. Their staff started asking questions of their data.
on their own. And in the first week when somebody was asking questions about the data in the system, and for this example, it is our system because that's what we do, but this could be any system where you're asking the data. One person was asking questions about the data. By week 4, 12 people were.
and nobody mandated it. There was just a short introduction to how do you ask questions about your data, and then people started chatting. So look at the bars. It was a quiet start, and then it took off like crazy. And the last bar is really only three days long, and it was the biggest week. And it was the busiest single day.
So they had asked nearly 300 questions about their data in four weeks, and they built 70 charts that were the ones they wanted, not the ones we thought that were important, not the dashboard that we gave them. These were the dashboards they created. And there was no analyst in the loop, and they didn't have to wait for that person at 3 o'clock.
So I want you to know what is, to notice what is driving that curve. And it wasn't training because we didn't do any. It was just curiosity. So one person found something interesting and the person at the next desk wanted in and said, oh, you're getting that answer? Oh, that's interesting. I want in on that. So their questions changed.
And here's my favorite part. Look at what they built. They had built 70 charts and four of the charts, only four out of the 70 were about how many members did they have? But 66 of the questions that they asked were about what were those members worth? Publications with products, the value of a member benefit, revenue, payment programs.
And that's what happens when people stop thinking about only counting when our time switches from how many members with just a little bit of time left for thinking into a lot of time for thinking because I got that answer. And they ask what it all means and what it's worth. And your teams have those questions too. It's just that we all get buried under the day that it takes just to get to that number.
Okay. Well, something else happened that nobody had planned. Departments

started talking to each other. So this was a very real situation that I lived when I was on the board of an association. The events team doesn't see the marketing team's emails. And so when you are wondering,
Well, I know that marketing sent out this e-mail. How many people registered as a result of it? That is a heck of a question to answer for a lot of places. I sent an e-mail, how many people clicked and joined? And then how many people clicked and joined, and what was the value of that? Oh, now you've got to combine with finance, right? What happens when all three of those things talk to each other?
So departments started talking and reading each other's data. So here was a question. Do new member joins Dr. product purchases? And who owns that? Well, membership owns the joins and publications owns the purchases. And neither one of them could have answered it alone. You'd have to bring those two data sets together. And again, that goes back to the
takes all day to get to the number. And nobody sometimes asks, because asking could mean that you've got a new project on your hands for one question. And you've probably got a lot of projects on your hands.
So once staff is able to put membership next to publications, events, and finance, they stopped asking about their own department and started asking about the association as a whole. And that's wonderful. That's exactly what our executive, that executive director who had the furrow brow, that's what she was worried about. Because one moment,
When a team can see another team's numbers, that's when things get interesting. So we'll come back to that.
OK, well, how do you teach it?
How do you teach people to get curious and what to do with that time once they get the number? Well, here's the simplest way, and this is what this other organization did. So I thought it was simple. I love it. And I think it would be helpful for other organizations as well. So I'm going to tell you their story. So the question got smarter by climbing. So they started with the first question. The first rung is just, let's just get to how many. Counting.
and making sure the numbers match what you already know. That's where everybody starts and it matters. It's how people learn to trust a tool. And rung #2 is changing how. Not a member on a day, but maybe movement over time. So we want to see some trends.
Rung #3 is how are they connected? Well, the first question needs 2 departments

data. Or that's the first question, sorry, rung 3 is the first question where we need 2 departments data.
Rung #4 is, well, how much is that worth? Maybe about the value to the membership. Or you could look for the dollar volume too. Those have, those questions have a finance answer. And rung #5 is, okay, so what do we do? Do we keep that thing? Do we change that thing? Do I make a recommendation? Do I make a decision?
And that's the part that's hard, because now suddenly I have to think about, well, I think we should do this, and here's why. And that's a really courageous place to be, and you need information for that. So these are real questions that a professional group asked. And this happened over 4 weeks. They climbed on their own. We didn't prompt them.
And here's what I want you to take away. You can teach this ladder, but you don't need to teach anybody AI or prompting or chat questioning. You just need to take them through something a little bit on how to ask the next question. So let's walk up to it one rung at a time with real conversations from a few different associations. Okay.
Well, let's start with rung one. How many? Here's a real conversation. These questions are word for word what a customer typed. She was asking questions about her data. She was a director of membership at a medical association, and she said, well, what are the top five members, or sorry, top five companies
For membership at our association.
Seems like a simple question.
And she got the answer, and in this case, it was from our system, and she said, but it, and it did something important. It said, well, read this as indicative, but not definitive, because only a tiny fraction of the records that you have that are contacts are even linked to an employer. So the ranking of your, of your,
your top five companies for membership is built on a pretty thin slice. But here was the human part. You can't do this without the human part, right? So she knew that. She knew her data. And she said, well, wait a minute. I think I have more members connected to an employer. Why don't we use the bill to ID from the orders instead? In other words, count
the organization that actually pays? And the answer became different. The top organization was paying for 821 members. So that's habit number one. Bring something that you know. You have deep institutional knowledge, and that's really important. You're going to have to have it because the data without you and you

knowing
the background of your association, it doesn't come together beautifully. But when you bring your institutional knowledge, it's important. So that's habit number one. Bring what you know. Your knowledge of your own association is part of the question and your tool will count. So know where the truth lives. So if you want to try this with your team, ask them how many.
of whatever it is that you want to know, and then ask them, well, where's the best place to count that from?
That seems like an easy question, but it probably isn't. And I mean, I'm not, no judgment in that. I've lived this dream. That is a hard question to answer.
Okay.
Well, on rung 2, you want to know some trends over time. How is it changing? So this is a real question from a director of education. Again, this is more of a counseling therapy association. And 3 weeks before their annual conference, this gentleman asked, how many, how were registrations doing compared to the last few years at the same point? And this is a really common question.
Am I trending high attendance, low attendance, medium attendance, or high, medium, low attendance, right, compared to last year in time? Well, he got the comparison because that was a pretty easy thing to come to. And again, now we're faced with this question of, oh gosh, I got that answer and I thought I was going to build pivot tables all day for that. And it gave him a comparison. And the comparison was,
Unfortunately, they were about 25% behind in registrations compared to the previous year.
But the system flagged that, oh, 2024 looks kind of thin. And this just goes back to the first rung. He brought some information. He says, well, that was an in-person conference, not virtual. We usually do virtual conferences. We did an in-person conference in 2024. So that one's going to stand out. That's going to be.
fundamentally different from the other years where we've held this conference. And so our system saved that forever, so nobody has to explain it again. And so now when he looked at 2024, he could say, oh, I get why that's an anomaly in there. We didn't have a bad conference. We just changed the format. Well, the data doesn't necessarily know that. It could know that depending on how people have logged it, but it doesn't necessarily know that.
So then the system asks them a question back and says, well, was 2021 virtual too?

Because that year changes the target. And that's habit #2. You might need to correct it because you bring institutional knowledge to the data that a system won't necessarily know. So when you say it out loud, the answer gets honest. So try that with your team.
Compared to the same point last year, how are we doing? And ask yourselves, what's different about this year that the data wouldn't know? Because a chart on its own without your information won't necessarily have all the full context.
Okay.
Rung #3, connected how. And this is where it gets really interesting, because it's the first rung, as we talked about, that requires the interplay of two different probably technology systems that you use in your association.
A marketing manager at a finance association was looking at a chart of how many course registrations came from people who had clicked an e-mail. But e-mail belongs to marketing and registrations belong to education. So 2 systems that didn't necessarily talk to each other. So she asked for a stricter version. Only count clicks that happened before the person registered. So the number dropped from about 36% to 11%. So she asked why. And here's what the data was able to find. It wasn't member behavior, which could have been a red herring. If every registration in the whole year was stamped at midnight, there was no time of day.
So any click on the same day automatically looked like it happened after registering. So think about that. That was a quirk that nobody knew about, sitting in the data in their registration system, quietly bending every before and after analysis they would ever do. And they found that
because somebody asked why. Tell me why.
So try that with your team. Does this lead to that? And when the answer surprises you, ask why. Because it could just be the way that your system is recording something, and that could provide you with information that really needs to be adjusted or thought of in a different light.
Okay.
Rung #4, ask what it's worth. So let's go back to our large professional society. They were giving members a free continuing ed benefit. And it's one of the most cited reasons that people join. People really love this benefit. But nobody had ever been able to put a value on it.
And why couldn't they put a value on it? Well, when a member redeems it, the transaction in the financial system posts at $0.00. That's a finance system thing. And

every zero is what every report showed. So leadership's looking at one of their flagship benefits.
this continuing ed benefit that comes with membership.
And it looks like $0.00 worth of activity.
But...
Again, the combination of data said, wait a minute, the product actually has a real catalog value. The zero was in the member redeeming it and showing it at zero, but not the value of that. If you price that out, that benefit delivered over $3 million of content in a year.
About 900 and thirty-seven dollars for every member who decided to redeem that piece of content that they that they got.
And members who used that benefit spent roughly four times more on everything else. So that changes the renewal conversation. We give you this becomes you took $937 of this last year, which is good. That's a worth what question. And it has a finance answer.
So maybe try that with your team. That's the 4th rung. What is this program actually worth to members who use it?
Because when you look at the data again in isolation, without combining the systems, you may not be able to put that monetary value on it. But they did because of the overlap of, because the systems talk to each other. And that gave them a real number, which was kind of remarkable, the $3 million worth of content in a year.
Okay, and then the last thing I would say is rung 5. So now what do you do? Well, now that you don't have to spend your whole day just getting to the answer, what do you do now? Well, what should we do? And this is the hard part. This is the place where the, where the, where that director had the furrowed brow and said, well,
I don't know. My people spend all day just asking how many. So in this case, the publications person at the association says, so should we give that free e-book to new members who join on automatic renewal? And watch how the answer moves. So first, members barely buy these titles, so it costs almost nothing.
But the system flagged the catch right away. Free because nobody wants it is not an incentive. So the publications person at the association reframed the question. Well, look at the price for each sale that each sale actually happened at. And the system said, well, that's a better lens. My first read was wrong. Members
do buy these titles steadily. So if we comp every new member, that would put real revenue at risk. So the recommendation became, it's a real incentive, but cap it.

Maybe 8 specific titles with a higher sticker value and almost no revenue at risk. And maybe run it for a pilot at a renewal cycle. So don't give it away for free and risk the revenue that you would have had otherwise.
And success means automatic renewal take up above 8%. And watch how many people actually download it, because if they don't, the e-book isn't the draw. That's the top of the ladder, not a report. So a decision with a test and a guardrail. And notice it got better because the human, the one like, the people like you who know your system,
You argue back with it and say, well, wait, would this pay for itself? And what would it tell us if it's working? What would tell us that it is working? So you've got to have the human in there to say, but wait a minute, are you sure? What would happen if this? What would happen if that? And that is the true value.
It's not just having some system or machine give you some data without your specific knowledge behind it. Your framework is critical.
Okay, three habits that make the climbing question work. So, number one, bring what you know. Count who actually pays.
The membership director knew where the truth lived.
Number 2, correct it. Oops, that one was in person. That was an anomaly. We did that one in person and normally we do virtual.
challenge the chart and see it. But wait a minute, does that look right? Because I know something about what happened there.
So, you can challenge, you can challenge the data that you see.
The important part is that everybody is writing this playbook right now.
There is no correct answer, but I do know there is something that I wouldn't do.
I'm not sure there's a right answer, but I do think there's a wrong one. I have seen a handful of customers say, you know, my people just aren't ready for this.
They just, they're just not ready for this. And can you imagine somebody saying to you, hey, you so-and-so, I don't think you're ready to ask important questions. I think people that are curious will come up with important stuff and empowering them to ask that is going to create the new set of problems, which is, okay, well,
Now I have people that aren't just data mining. They're thinking about how to solve things. Is that harder to manage from a leadership perspective? Sure, but it's better to have all those creative people in a room, and that curiosity is where it starts. So we've watched a handful of people doing this. Nobody's behind because this is a new world, being able to get to that and flipping our time.

into, well, I got to the how many so quickly. What do I do with my time now? How do I make decisions? So this is what we've seen so far. So let me give you just a set of questions that might be helpful for you. So 4 things that we've seen, by the way, and then I'm going to give you the questions. Number one, curiosity spreads and you can't mandate it. But people are naturally curious. They're going to ask questions. Remember in our example, one person became 12 in four weeks and nobody was told to be curious, they just were.

And people at the next desk, once you open up the world of that, they were they were kind of they started to talk, and so more people wanted in, and then the departments started to collide.

in a good way, seeing each other's data and asking questions about how their systems work together and what they could answer. One team's question is going to surface another team's work.

And at the same place, somebody might ask an innocent question about an average member discount and find that, you know, some prices are priced higher for members than for the public. Well, that's a real finding. It's also somebody's catalog, but that's a good finding. You want to know that. So how your organization could react

in that moment when you find something like, oh, wait a minute, shoot, we are pricing our product higher for our members than we are for the general public. That's embarrassing. Well, not really. You found it. Now you can solve it.

And those are normal things that happen, by the way, in all associations. So at least now the collision of information is allowing you to solve things that you might not have been able to solve or even know otherwise. And then the third thing is that ideas will outrun your capacity. You're going to come up with so many ideas. It's going to be hard to choose.

Well, that's a really good problem to have. It's not just, let's just send a few more emails. You're going to have great new ideas on how to tackle projects that can be more focused and larger. So you're going to have to think about prioritization. And that's another one of those things that we'll spend more time doing. And the last thing I would say is data.

often needs to be corrected. You'll look at it and you'll have some context. Oh, 2024 was virtual. Oh, this count was, you know, was different. That was a COVID year or whatever, whatever the anomaly might be.

So.

These are some of the best stories that we've seen. Somebody push and it gets better. And if you think, if your team thinks that the goal is to trust the output, they can stop at rung #1. But if they know the goal is to kind of argue with it and question it, they'll naturally climb. Their questions will naturally climb.
So, here's an idea that helps with the third problem: too many ideas.
everyone finding an idea could have one owner and one next step. So here's a real example from a finance association. Their flagship training event looked like it was dying. Registrations had fallen by nearly half in three years, and the natural reaction for them was, well, this thing's declining. Let's cut our investment.
But when they looked at registrations per offering, the picture flipped, per session, registrations were growing every single year. They'd simply gone from three offerings a year to one. So the decline was supply, not demand. That's a finding. And on its own, it's just an interesting chart.
It matters when there's a real next step. So treat the offerings as the growth lever and plan the next year around it. So one finding, one owner, one next step. If you can't name the owner, it goes in the parking lot. It's not a failure. It's just how you keep a handful
of ideas and creative curious people from turning into a room full of half-finished projects.
Okay, this is where I'd start.
These are suggestions. They're not necessarily a proven method, but we're all in the same boat. We've all got this issue of there's so much data now, and I get to these answers a lot quicker than I used to. So now what do I do with that information? Well, if I were leading an association through this, here's where I'd start. And I'd start this way because I've watched a customer do it, and I think they did awesome.
So start with a curious person.
Find somebody who already asks why and let them go first and bring a couple of people on board.
and make what they find visible.
Just for, and you don't need much time for this, by the way. The stories that I've told you happened within 30 days. This wasn't a six-month thing. This was a 30-day thing. Maybe get together a couple of times and ask why. What did you find?
It doesn't have to be a status meeting. It can be just a curiosity, a show and tell. What did you find? And that's how curiosity spreads. And give every finding one owner and one next step. We just talked about that. Make it a found, not a blamed. When

somebody's question surfaces a mistake in another department's work, thank them because that is going to be, that will happen.
because that's normal. So that will happen. And the first time somebody gets in trouble, obviously, for finding something like, hey, we're charging more for not or for not for members than we are for non-members. It seems, you know, that's an important one to not just to be thankful for and and to take action on, but not to be grouchy about.
And then keep a parking lot. Write down the good ideas that you can't chase yet. We call them ready to work or sometimes we put ideas into what we call here at A2, we put them into what we call the graveyard. Those ideas, those are good ones, but we're not going to chase them right now for whatever strategic reasons. Sometimes the answer is not now. And none of this is about technology. It's just about leading people.
who suddenly have room to think.
So, here's 6 questions for your leadership team.
These are things you can take home. You don't need the answers today.
You just need conversations. Who are our curious people? How will they see what they, how will we see what they find? Because curiosity spreads when it's visible.
Where and how often will we share what we find? Could be formal, could be informal, meeting, a Slack channel. Just pick one.
When a finding touches another department, how do you bring those ideas together? This is an important one that protects trust. Nobody wants to learn about a problem in their area in front of a room.
So think about how you want to approach those things.
And 4, who decides what we chase? What are our priorities? And what do we put in a parking lot or the graveyard? Somebody will have to say not now kindly, because lots of ideas are going to come forward. That's a good skill.
It's not an easy skill.
But in a group, it's always important to have that person who will say, hey, great idea. Can we chase that one down later? How do we prioritize?
And.
I could put another one. What do we stop doing in favor of something else if the number is easy? This is often skipped.
If the day is used to take the number, it just fills up with other busy work, nothing changes. And then of course, how will we know? How will we know if it's working?

Maybe it's the questions are getting harder, maybe it's the decision we made faster. But these six are on the card. You can feel free to take a screenshot or whatever. Use them, change them, make them yours, but this is how we make the playbook. And this is, it's a whole new playbook now for us. This is different.
It's a really different situation to be faced with now that people can get to those numbers really fast and easy.
So I might challenge you, if you were able to get to this, get to answers quicker, what would your team ask in week 4? What do you think? I'm interested to know if anybody, if anybody wants to share, what would your team ask in the 4th week, do you think?
Is there a question you've been burning to ask?
You can feel free to put something in the chat, and meanwhile, I'll just share one of the ways that I'm thinking about it is...
I've shared this with my team.
Oftentimes, at associations, we wonder.
Who is non-renewing and how do I chase them harder? And my team, if anybody, if any of my team is on here, they will have heard this from me. But I always think of a nature show, you know, where there's the herd of animals and there's the ones that are leading towards getting towards the water source and there's the ones that are behind.
What do we chase harder? Do we chase the ones that are behind and remediate, or do we chase the ones that are in front?
And I guess the question that I would ask if I was in an association, well, I mean, and I was, but I think the most relevant question is what is working? People vote with their time. They vote with their money. I'm going to join, I'll go to this thing, or I'm going to give it my time. The things that people are doing do more of the things that are working.
and less of the remediation. Because those people that are pushing you forward, they're the ones that are going to bring more people on board, continue to renew and get value. And the people that are behind, it may be your content isn't relevant, but that's often not what it is. It could be, I'm having a life event. My work has gotten really
crazy. So that's what I would ask. I'd want to know what's working, which seems like an easy question and I'm not sure it is.
But there you go. I hope these are helpful for you. I'm just going to pause for a

minute. That's all the content that we have for today. I hope this was helpful for people in terms of thinking about thinking about how to lead in this in as our time flips. And certainly if there's anything we can do to continue the conversation with you, happy to do it. So I'll just pause here and

See if there's any other things that we can do to help. And otherwise, it's Friday. I hope everybody has a great weekend.

Okay, y'all, I think we're good. Have a great weekend. Thanks for joining.

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